INSTRUCTIONS FOR PREPARATION AND USE OF
FAA FORM 4040-2, FAA CREWMEMBER CHECK RECORD

1. The following instructions apply to all users of FAA-owned, loaned, leased, bailed, or rented aircraft. Information reported through use of this form is essential data required to verify and validate qualifications of flight crewmembers. This form is the supporting document for the FAA Form 4040-7, which is used to enter these qualifications into the Flight Activity and Crew Tracking System (FACTS). This form may also be used alone (without the Form 4040-7) to enter information into FACTS. Reports generated by FACTS provide necessary information for budget review, program monitoring, and internal management control.

2. All check flight requirements shall be recorded on FAA Form 4040-2. Complete this form according to the instructions below. The office with jurisdiction over allocated flight-hours MUST ensure that this form is prepared in strict conformity to these instructions to assure maximum accuracy in the transfer of data to FACTS.

3. At the completion of flight and ground evaluations, the applicant signs in block 24 to confirm that the evaluation is complete and the result of the evaluation is understood. The original form shall be placed in the crewmember's flight record folder. A copy shall be given to the employee checked.

4. The master copy of this form is located on The National Flight Program Oversight's web.

5. If a participant is removed from the flight program due to resignation, retirement, or reassignment to a non-participant position, the crewmembers' flight record folder must be retained by the losing organization for one year after separation. The record may be offered to the participant for own use at the end of one year.

INSTRUCTIONS

	Permanent File Copy	Use box in upper right corner of form as a reminder when the form is to be retained permanently in a crewmember's record (such as for initial check flights in any FAA or rental aircraft category, class, and/or type.)
	Data Entry	Enter the initials of the operator who input the data contained on this form into the FACTS database. Enter the date the input was made.

Check Information

Block No	Block Title	Action
1.	Type of Check(s)	Place "X" in box next to the type of check flight being flown. Check all that apply.
2.	Type of Check Pilot	Place "X" in box next to the type of check pilot conducting the check.
3.	Base Month	Enter month and year when evaluation was conducted for the airmen evaluated (e.g., MM YYYY.) NOTE: Base month is a calculated field in the database. It is usually associated with initial qualification in a particular aircraft and serves as a reference for the approval authority and check pilot as to whether the check will be within the grace period.

Crewmember Information

4.	Name	Enter last name, first name, and middle initial as shown on the airman's certificate. ALWAYS enter middle initial in place of the middle name.
5.	Crew Assignment	Enter the crewmember assignment (PIC, SIC, Flight Engineer, etc.)
6.	Crew Number	Enter crew number of the airman being evaluated
7.	Certificate: Number/Grade	Enter the certificate number and grade (e.g., ATP, Commercial, etc) of the airman being evaluated.
8.	Medical: Class/Date	Enter class and date of the medical certificate for the airman being evaluated.
9.	Routing Symbol	Enter the routing symbol of the airman being evaluated.

Vehicle information

10.	Vehicle	Place "X" in box next to vehicle the check was taken in. If the check is taken in an aircraft, enter category - class and aircraft type; if taken in a simulator enter level (A-D); or if taken in a FTD enter level (1-7).
11.	Configuration / Maneuvers	Place "X" in box if check taken in Tail-wheel / Ski. Place "X" if Touchdown Autorotations are authorized.
12.	Crewmember Verification	Signature of crewmember acknowledging check ride being conducted and date signed.
13.	Management Approval	Signature of approving official and date signed. Print name and routing symbol of approving official below signature.

Evaluation

14.	Check Pilot Name	Enter last name, first name, and middle initial as shown on the check airman's certificate.
15.	Check Location	Enter office and location of office administering check (e.g., OKC, SAT, ACY).
16.	Date of Check	Enter date check was completed in MM/DD/YYYY format.

Maneuvers/Procedures Grade

17.	Maneuvers / Procedures Grade	Block 17 contains a listing of maneuvers and procedures applicable to various check flights, aircraft types, and/or categories of airmen. The listing of maneuvers is continued on the back of the form. Enter one of the following letters underneath the Aircraft, Flight Training Device (FTD) or simulator columns that indicates the grade of each maneuver / procedure: **S** = Satisfactory **T** = Trained to Proficiency **U** = Unsatisfactory **N** = Not Applicable **W** = Waived **NOTES:** 1. When (Oral or Written) or (Oral or Flight) appear after an evaluation item, circle which application applies. 2. In block III Instr. Airplane/Helicopter, A.1., "Instrument T/O (RVR _____)," insert the lowest runway visual range used in the simulator for the instrument takeoff (e.g., RVR 1200).

Post Evaluation Summary

18.	Vehicle Data	Enter the Registration/Serial Number and Manufacturer/Model/Class of aircraft used for check.
19.	Block Time	Enter duration of evaluation flight in hours and tenths of hours (e.g., 1.2).
20.	Ground Time	Enter time used for ground evaluation in hours and tenths of hours, if applicable.
21.	Result of Check	MANDATORY ENTRY. Place "X" in the box next to the status of evaluation (i.e., Satisfactory or Unsatisfactory).
22.	Check Authorizations and Expiry	Place "X" in the box next to the type of authorized check(s) completed. For each check satisfied, fill in the month and year when evaluation(s) expires to the right of the word "Expires" (e.g., March 2008). In several instances, multiple FAR or program references are listed as standards for a particular check. The participant's job category or assigned flight program determines the standard which applies for his check.
23.	Remarks	The check pilot should write a short narrative of the evaluation. For an unsatisfactory check flight, each area in which a FLIGHT MANEUVERS GRADE of "U" was given must be documented in this block by the check pilot.
24.	Crewmember Concurrence (Optional)	The crewmember may sign in this block when the flight and ground evaluations are complete and all problems are resolved. The airman's signature confirms that the evaluation is complete and the result of the evaluation is understood.
25.	Check Pilot Verification (Required)	The check pilot signs this form when all entries are complete and the flight and ground evaluations are complete. Authority date should be completed when required in specific FAR 135 flight programs.
26.	Flight Review Endorsement (Crewmember must be evaluated to certificate held)	The check pilot completes this block certifying that the crewmember evaluated has satisfactorily completed a flight review of section 61.56(a).